

Visit Finland Digital Demand – D2©

Executive Summary – Data refresh Q2

Version 1.0

August 5th, 2022



Funded by
the European Union
NextGenerationEU

Scope of the project

The Insight+ solution is prepared for Visit Finland to reflect the international appeal of Finland within the Tourism dimension.

The Tourism dimension is defined by 274 unique search tags (Micro-brandtags), reflecting a wide scope of potential touristic searches from *Generic Information* through *Accommodation* and specific *Tourism Attractions*.

The time range for the project includes a quarterly data refresh from January to December 2022, and baseline searches covering the previous three years (2019 – 2021).

A total of 19 international target markets (Germany, United States, Japan, United Kingdom, Italy, France, Spain, Netherlands, Estonia, India, Switzerland, Canada, Sweden, Austria, Belgium, China, Australia, South Korea, and Russia) and the domestic market (Finland) are overviewed in terms of searches, Brandtag popularity, seasonality and the rank of importance.

Subscription details

Type of Subscription

The **"Insight+"** solution is prepared for *Visit Finland*, to reflect the global appeal of Finland within the *Tourism* dimension.

Destination (1):	Finland
Dimension (1):	Tourism
Time Range (3 years):	January to December 2019 – January to December 2021
Refresh (1 year):	Q1, Q2, Q3 and Q4 2022
Languages (22):	Arabic, Chinese, German, Danish, Estonian, English, Spanish, Finnish, French, Indonesian, Italian, Japanese, Korean, Lithuanian, Dutch, Norwegian, Polish, Portuguese, Russian, Swedish, Turkish, and Vietnamese

The subscription includes:

- (a)** Overview of Finland's [D2© Summary](#) with number of searches, evolution, seasonality of searches, ranking in the region, most popular Brandtags, and target markets.
- (b)** In-depth analysis of Finland's [ALL Brandtags Families](#) (dynamic cards), featuring the number of searches, rank of importance, evolution, Micro-Brandtag share, seasonality, and target markets. Detail of Brandtag Families (3).
For further details please check the Brandtag Classification chapter
- (c)** In-depth analysis of Finland's [ALL Brandtags](#) (dynamic cards), featuring the number of searches, rank of importance, evolution, Micro-Brandtag share, seasonality, and target markets. Detail of Brandtags (69).
For further details please check the Brandtag Classification chapter
- (d)** In-depth analysis of Finland's [ALL Micro-Brandtags](#) of your choice (dynamic cards), featuring the number of searches, evolution, seasonality, and target markets. Detail of Micro-Brandtags (274).
For further details please check the Brandtag Classification chapter
- (e)** Overview of Finland's [20 Target Markets](#) of your choice (dynamic cards), featuring the number of searches, evolution, rank of importance, evolution, top Brandtag popularity, and seasonality. Detail of Target Markets: Germany, United States, Japan, United Kingdom, Italy, France, Spain, Netherlands, Estonia, India, Switzerland, Canada, Sweden, Austria, Belgium, China, Australia, South Korea, Russia, and Domestic (Finnish) market.
- (f)** Overview of the [4 Competitors](#) of your choice (dynamic cards), with number of searches, evolution, seasonality of searches, ranking in the region, and most popular Brandtags. Detail of Competitors: Denmark, Iceland, Norway, Sweden

Conclusions Q1 2022

- #1 The analysis framework remains the same: The analysis framework remains the same: International searchers exc. Russia and China
- #2 Finland consolidated its Covid-19 recovery, showing stable growth in Q1 2022, while Denmark continued the strong growth trend from 2021.
- #3 The Ukraine invasion is having a visible initial impact on Finland's tourist demand, however not yet on other competitors.
- #4 Germany consolidated its position as the main target market for Finland, while the Netherlands, the UK and France show a high recovery rate.
- #5 *Northern Lights* and *Skiing* show high growth, along with other important Brandtags, such as *Tourism packages*, *Tours*, *Hotels* and *Things to do*.
- #6 The domestic market volume remains high and stable.

Conclusions

Q2 2022 data refresh

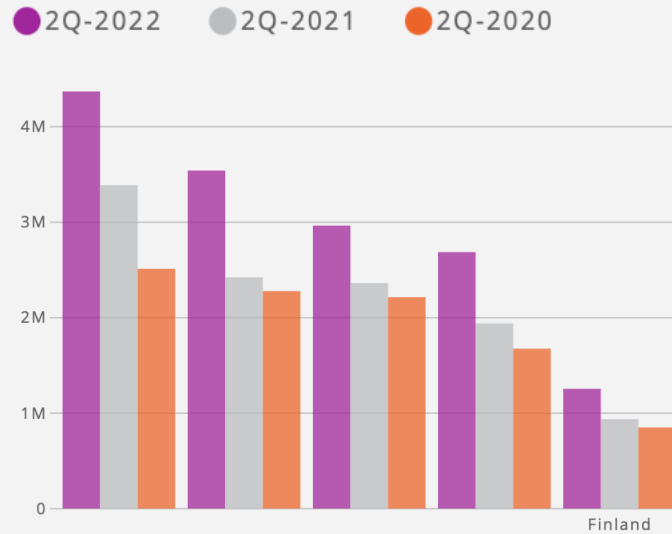
Conclusion #1

Demand is increasing for the Nordic countries in Q2 2022

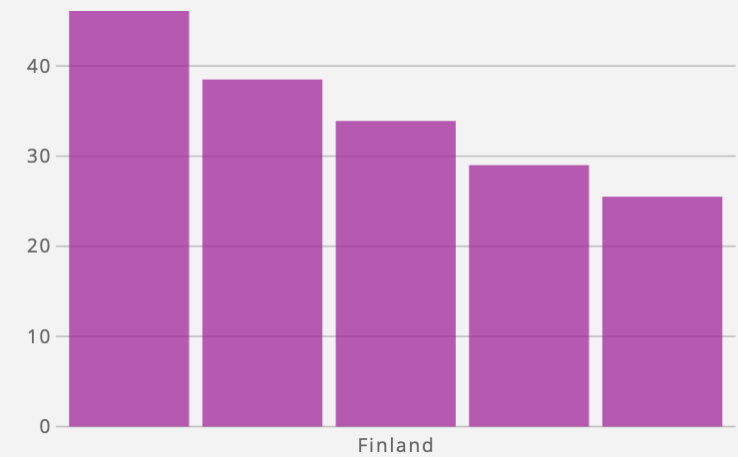
During Q2 2022, all Nordic countries grew by an average of 34,6% compared to the same quarter in 2021.

Finland's recovery speed is close to the Nordic average (33,9%).

Benchmark ranking (excluding RU and CN)



Growth %



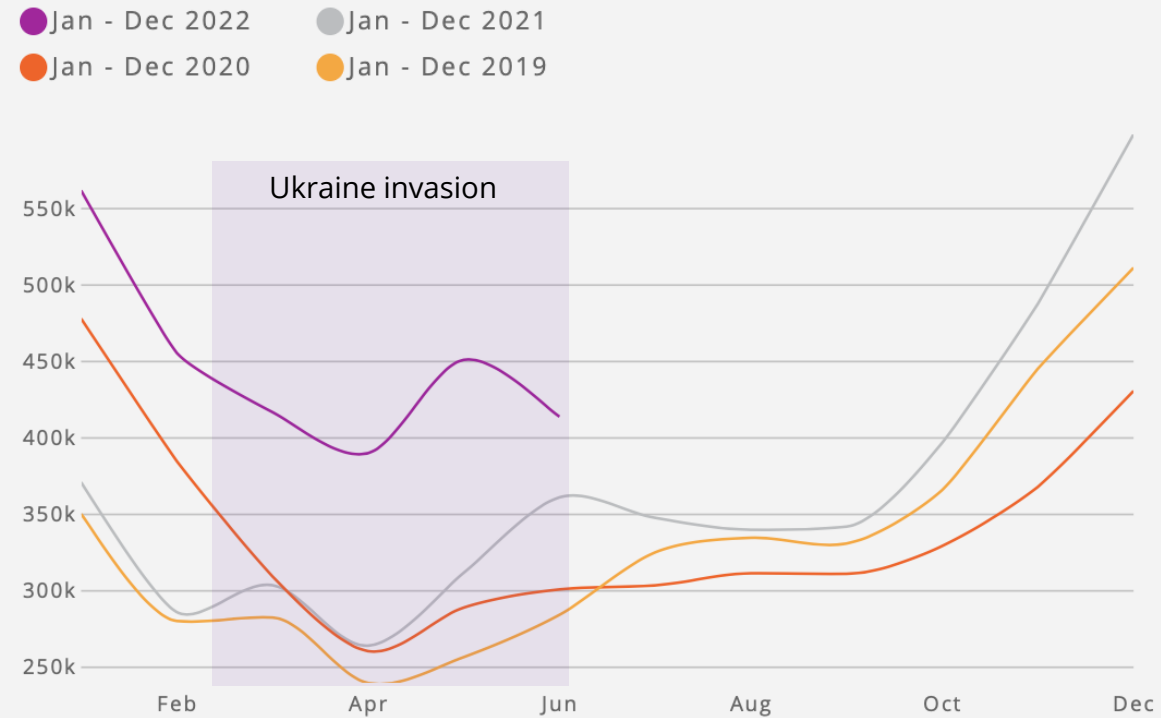
Conclusion #2

The initial impact of the Ukraine invasion on Finland's tourist demand has passed. May peak for Finland

Data from Q1 and Q2 2022 shows a systematic decrease in searches. It was particularly felt in March, with the start of the Ukraine invasion, until April 2022. The trend changed in May, when demand significantly increased (450K searches). In June the trend stabilized.

The search volume experienced during Q2 2022 is 34% higher than in the same period last year.

Seasonality of searches for Finland



Conclusion #3









United States becomes the main target market for Finland in Q2 2022









The top 3 target markets for Finland remain the same, but the order has changed.

The United States now leads the ranking for the international target markets distribution with 134K searches. The American market gained its position with an increase in demand by +39,5% compared to the previous year (Q2 2022).

Japan (119K) and Germany (113K) follow in the first tier, and the United Kingdom (68K), Italy (59K), France (54K), and Spain (52K) in the second tier.

Target Market Distribution Q2 2022 (excluding RU)

Rank	Flag	Target Market	Searches	Growth
1		United States	134,907	39.5%
2		Japan	119,932	16.7%
3		Germany	113,935	9.1%
4		United Kingdom	68,831	27.8%
5		Italy	59,885	15.9%
6		France	54,190	26.7%
7		Spain	52,910	35.9%
8		Estonia	41,686	11.6%
9		India	38,792	2.9%
10		Sweden	37,606	18.8%

Rank	Flag	Target Market	Searches	Growth
11		Canada	33,637	47.1%
12		Netherlands	31,464	-25.6%
13		Switzerland	27,948	15.6%
14		Australia	20,666	73.8%
15		Austria	18,914	18.6%
16		China	18,071	0.3%
17		Belgium	16,922	-0.4%
18		South Korea	12,949	22.0%

Conclusion #3











United States becomes the main target market for Finland in Q2 2022, while long haul markets show fast recovery



All English-speaking markets (with the exception of India) have experienced an amazing growth in demand. Canada and Australia stand out with +47,1% and +73,8%, respectively.

The European markets with the highest demand, such as the United Kingdom, France, and Spain, show growth of over 25% in Q2 2022. Meanwhile, the Netherlands with the highest recovery rate back in Q1, is now the only market showing a decrease in demand of -25,6%.

Finally, India, China and Belgium's volumes stabilized at 2021 levels.

Target Market Distribution Q2 2022 (excluding RU)

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1		United States	134,907	39.5%
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Conclusion #4

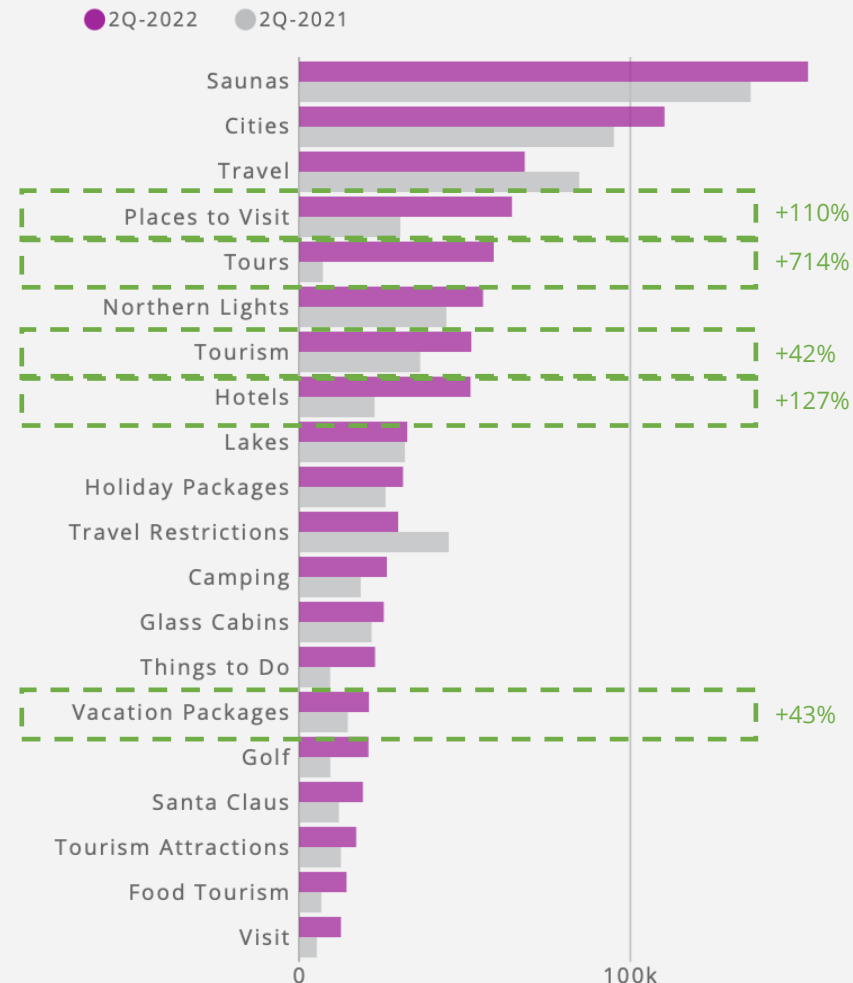
Generic searches continue to grow

Compared to the same period in 2021, the majority of the Micro-brandtags for Finland show growth in terms of searches in Q2 2022.

The amount of international tourist searches grew for *Hotels* (+127%) and for general information, such as *Places to Visit* (+110%), *Tourism* (+42%) and *Vocational Packages* (+43%), respectively.

Demand for *Tours* in general increased seven times compared to the respective period in 2021.

Top 20 Micro-brandtags for Finland *Internationally*



Conclusion #4

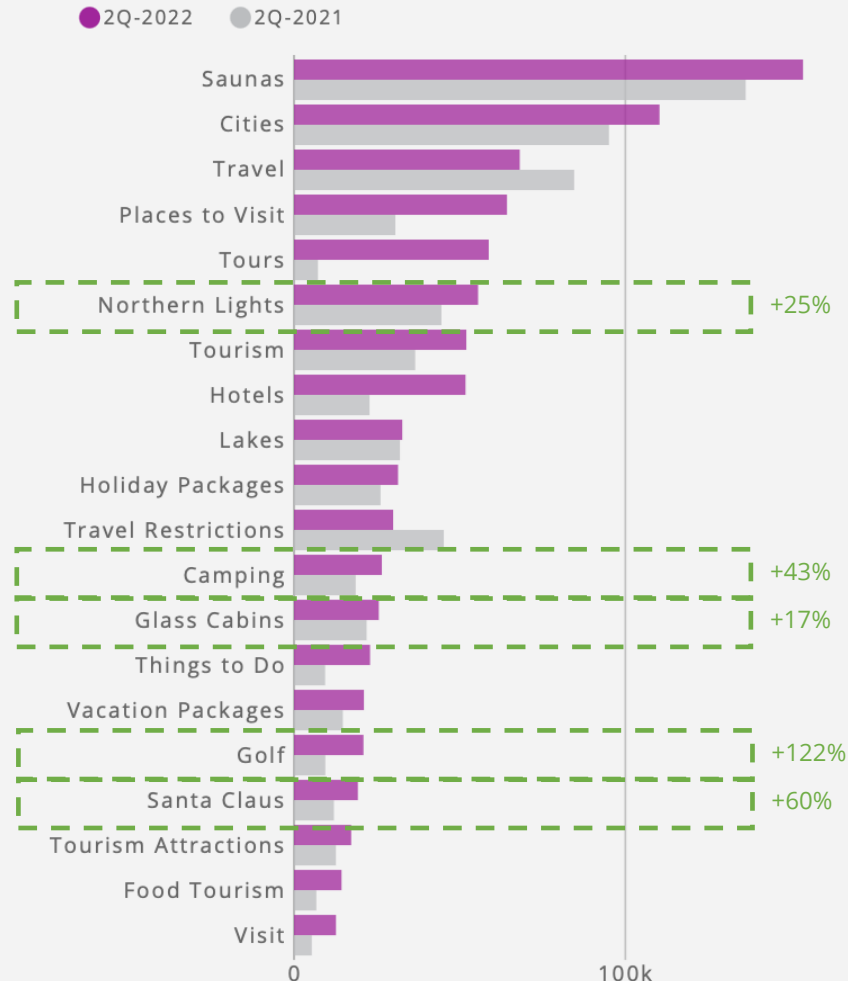
Generic searches as well as searches for inspiration and outdoor activities continue to grow

The number of international tourist searches for inspiration is higher than it was in 2021 for the *Northern Lights* (+25%), *Glass Cabins* (17%), and *Santa Claus* (+60%).

Camping grew by +43%, meanwhile *Lakes* stabilized (+2%).

Demand for *Golf* increased by 122% compared to the respective period in 2021.

Top 20 Micro-Brandtags for Finland *Internationally*

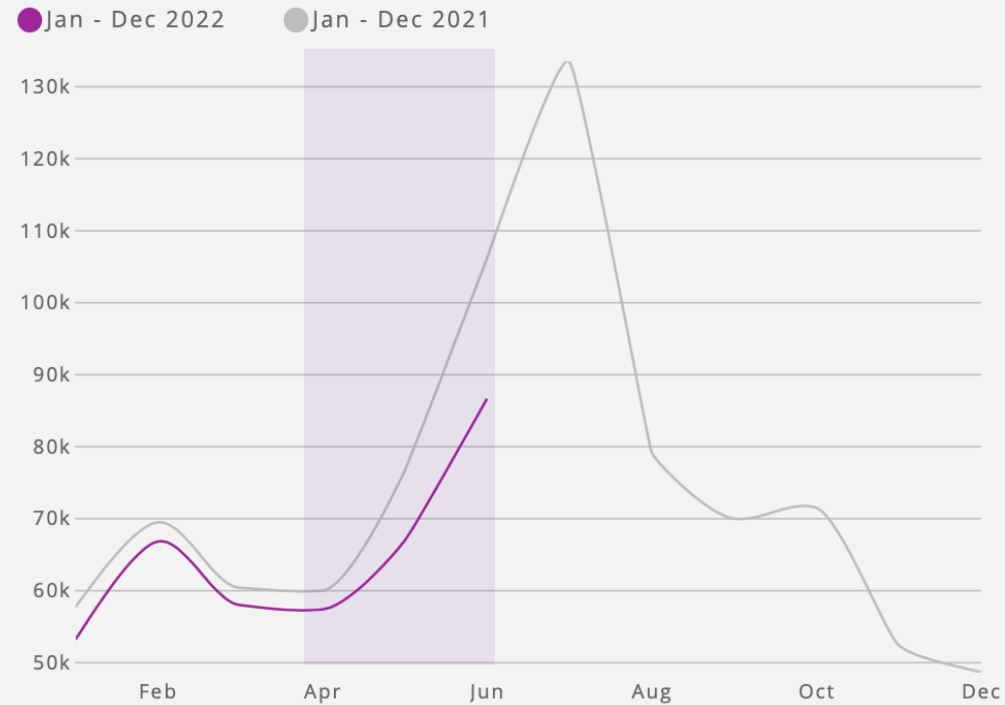


Conclusion #5

The domestic market volume starts to decrease

The gap between the volume in Q2 2022 and the same period the year before is starting to get wider. With over 211K searches, the domestic market of Finland is now 13% below the 2021 results.

Seasonality of searches for Finland **Domestic**



Conclusions 21 2022

- #1 Demand is increasing for the Nordic countries in Q2 2022.
- #2 The initial impact of the Ukraine invasion on Finland's tourist demand has passed. May peak for Finland.
- #3 The United States became the main target market for Finland in Q2 2022, while long haul markets are showing a fast recovery.
- #4 The number of generic searches continues to grow, as it does for inspiration and outdoor activities.
- #5 The domestic market volume has started to decrease.

Thank you!

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